

**PAYMENT SERVICES USER MANUAL ..... 1**

**ATTACHING SCANNED DOCUMENTS ..... 1**

**ATTACHING A SINGLE INVOICE DOCUMENT .....1**

**ATTACHING MULTIPLE INVOICE DOCUMENTS .....4**

---

# PAYMENT SERVICES USER MANUAL

---

## ATTACHING SCANNED DOCUMENTS

---

### INTRODUCTION

You can attach scanned invoices, letters, or any other supporting documents to an invoice record in Payment Services. The scanned documents will then stay with the invoice for approvers, auditors, or managers to view online. This should reduce the time and costs of mailing and storing physical documents.

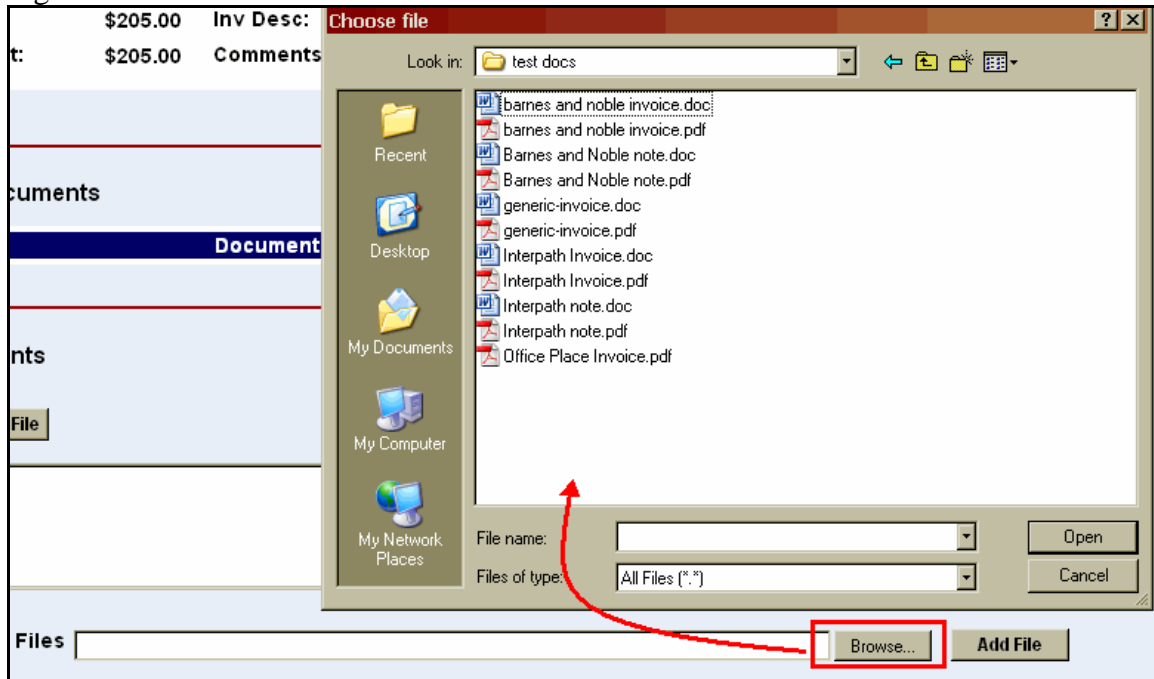
Documents must be scanned at your agency or agency field location and saved on a local or network hard drive. The Payment Services application is used to browse for and upload the scanned documents and they will be stored on the State Controller's server. Your agency may need to develop document retention rules to determine if copies will be kept by your agency as well and for how long. Refer to the [Department of Administration's Web site](#) for record retention information.

Scanned documents can be attached to the invoice any time after the invoice has been saved in Payment Services.

### ATTACHING A SINGLE INVOICE DOCUMENT

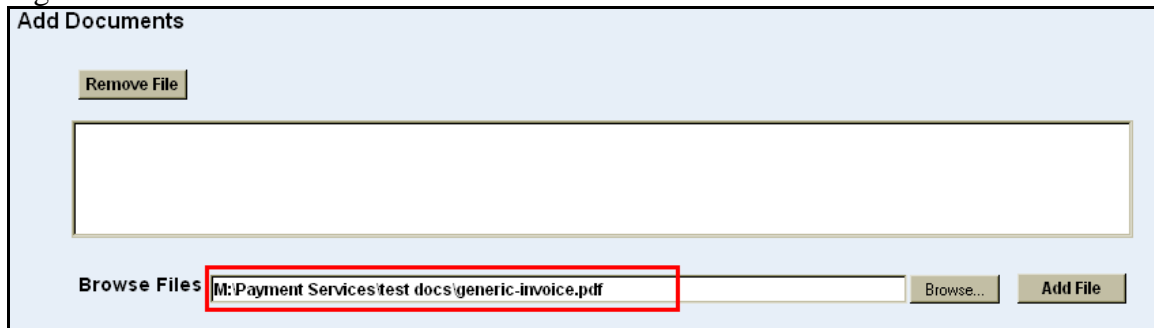
1. Depending on your agency's process, open the **Documents** screen:
  - a. After saving the invoice on the **Invoice** screen, click the **Documents** tab. (The invoice does not need to be authorized.)
  - b. If you are working on an invoice in another screen, click the **Documents** tab.
  - c. Use the **Status** screen to locate and select the invoice to open it in whatever screen is associated with its status. See the Status document for details. Click the **Documents** tab.
2. Click **Browse** to locate the scanned document file. Valid types include files with the following extensions: .pdf,.jpg,.gif,.bmp,.png,.tif,.tiff

Figure 1 - Browse for scanned document



3. Highlight the scanned document and click **Open**. The document path will appear in the **Browse Files** field.

Figure 2 - Path to document



4. Click **Add File**. The document will be added to a queue. The filename of the scanned document will be used in the **Document Title** field. To add another document, see the [Adding Multiple Invoice Documents](#) section below.

Figure 3 - Document added

The screenshot shows the 'Add Documents' form. At the top is a 'Remove File' button. Below it is a text box containing the file path 'M:\Payment Services\test docs\generic-invoice.pdf', with 'generic-invoice.pdf' highlighted by a red box. A red dashed arrow points from this box to the 'Document Title' field below. The 'Document Title' field contains 'generic-invoice' and is also highlighted by a red box. Below the title field is a checkbox labeled 'Create Single Document:' which is checked. To the right of the checkbox is a 'Create Document(s)' button. Above the title field is a 'Browse Files' section with an empty text box, a 'Browse...' button, and an 'Add File' button.

5. Type a title for the document or leave the default title based on the file name. Unless you have renamed the document already, scanning software usually doesn't give a friendly file name. This gives you the opportunity to change it to something usable.
6. For only one document, leave **Create Single Document** checked
7. Click **Create Document(s)**. The document will appear in the **Attached Documents** area

Figure 4 - Attached document with View and Delete actions

The screenshot shows two parts of the interface. The top part is a table titled 'Attached Documents'. It has three columns: 'Documents Title', 'Size', and 'Action'. The first row contains 'generic-invoice' in the title column, '22K' in the size column, and 'View' and 'Delete' links in the action column. The 'generic-invoice' text and the 'View'/'Delete' links are each enclosed in a red box. Below the table is the 'Add Documents' form, which includes a 'Remove File' button, an empty text box for the file path, and a 'Browse Files' section with an empty text box, a 'Browse...' button, and an 'Add File' button.

8. Click **View** to verify the document. If necessary, click **Delete** to delete it.

Once attached, the scanned documents are saved. There are no Save buttons as on the other screens.

## ATTACHING MULTIPLE INVOICE DOCUMENTS

**NOTE:** You will not be able to enter custom **Document Titles** when adding multiple documents. In order to add multiple documents and enter your own **Document Title**, add and create the documents one at a time.

After adding the first document to the queue as described in steps 1 – 3 above, do the following.

1. Repeat steps 1 – 3 above to add a second document to the queue. Note the **Document Title** remains from the first document added. Adding the second document does not change it.

Figure 5 - Adding multiple documents

The screenshot shows the 'Add Documents' interface. At the top left is a 'Remove File' button. Below it is a list of files: 'M:\Payment Services\test docs\generic-invoice.pdf' and 'M:\Payment Services\test docs\generic-letter.pdf'. The 'generic-invoice.pdf' filename is highlighted with a red box. A red dotted line connects this box to the 'Document Title' field below. The 'Document Title' field contains the text 'generic-invoice' and is also highlighted with a red box. Below the 'Document Title' field is a checkbox labeled 'Create Single Document:' which is checked. To the right of the checkbox is a 'Create Document(s)' button. Above the 'Document Title' field is a 'Browse Files' section with a text input field, a 'Browse...' button, and an 'Add File' button.

2. Choose to leave **Create Single Document** checked or click the checkbox to clear it. Your choice will affect the titles of the attached documents:
  - a. Leave the checkbox checked, click **Create Document(s)**, and all of the attached documents will have the same document title based on the filename of the first document added.

Figure 6 - Same document title

**Attached Documents**

Documents Title	Size	Action
generic-invoice	22K	<a href="#">View</a> <a href="#">Delete</a>
generic-invoice	7K	<a href="#">View</a> <a href="#">Delete</a>

**Add Documents**

[Remove File](#)

**Browse Files**  [Browse...](#) [Add File](#)

**Document Title:**

**Create Single Document:** ☒ [Create Document\(s\)](#)

- b. Clear the checkbox, click **Create Document(s)**, and the attached documents will have different document titles based on the filenames.

Figure 7 - Different document titles

**Attached Documents**

Documents Title	Size	Action
generic-invoice	22K	<a href="#">View</a> <a href="#">Delete</a>
generic-letter	7K	<a href="#">View</a> <a href="#">Delete</a>

**Add Documents**

[Remove File](#)

**Browse Files**  [Browse...](#) [Add File](#)

**Document Title:**

**Create Single Document:** ☐ [Create Document\(s\)](#)

Once attached, the scanned documents are saved. There are no Save buttons as on the other screens.